

# **MENU OF SERVICES CRP COLLABORATIVE PROJECT**

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Iowa Division of Vocational Rehabilitation Services



# Menu of Services Implementation Manual

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# Menu of Services Introduction

The development of the CRP Menu of Services concept is the result of a collaborative project between the Community Rehabilitation Program (CRP) partners in the State of Iowa and the Division of Vocational Rehabilitation Services (DVRS). The project was initiated due to the inadequacy of the existing outcome based fee agreements in which partners and rehabilitation counselors voiced various concerns. After careful study and consideration it was clear that the current fee agreement system did not meet the needs of the eligible clients receiving services through the state agency.

## **Background**

In 1999, DVRS participated in a study through Virginia Commonwealth University (VCU) to study the efficiency and effectiveness of fees paid by public vocational rehabilitation agencies to community rehabilitation providers. One of the many outgrowths of that study was a clear message that in Iowa we had considerable variances in how costs were calculated by the community providers. Therefore the assignment of fees by DVRS was, at best, based upon anecdotal information and past practices. The study also indicated that definitions for specific services needed to be consistent statewide, and the outcome expectations for CRPs to receive payment for services needed to strengthen.

DVRS had an internal group work with VCU to analyze the data and begin working toward developing strategies to address identified concerns. A charge was developed for the work group in January of 2001: "To analyze CRP costs and establish a methodology to set rates/fees for service for all CRP services".

Members of two Iowa CRPs joined the work group. Shortly thereafter, DVRS supervisors and counselors were added, as well as a representative of the Iowa Department of Human Services. Initially the hope was to use a model from another state and implement a new system by October 1, 2001. After inviting in representatives of VR systems in Massachusetts and Oklahoma, the work group began to see the value in considering establishing a "menu" of services concept that would meet the needs of the clients, providers and DVRS. The timeline for implementation was adjusted, and a new plan was developed to gain additional input from other providers and DVRS staff.

Numerous facilitated meetings were held over the course of the next several months. VCU staff facilitated one such meeting with over 100 provider and DVRS staff members present to define the major milestones for services. Smaller work groups have met to structure financial analysis systems and improve upon the milestone definitions. This has brought us to our present benchmark of testing the hypothesis that a menu of services increases options and flexibility for clients, providers and the DVRS counselor. Additionally, the structure permits for increased consistency in evaluating the costs for specific services and ease in reviewing fees at scheduled times.

## **Project Goals**

After studying similar projects in other states and reviewing the issues specific to the State of Iowa the collaborative project partners agreed that it was necessary to redesign the entire fee for service structure. The expected goals to accomplish as a result of the redesign were to:

- ❖ Develop a more flexible and DVRS counselor and client-driven, outcome-oriented service delivery system.
- ❖ Develop a more equitable payment reimbursement system as outcomes occur.
- ❖ Develop a statewide system with standardized payments and quality core services.
- ❖ Improve collaboration and communication among DVRS counselors and CRP providers.

### **Process to Achieve Goals**

#### ***Goal 1: Develop a more flexible and DVRS counselor and client-driven, outcome-oriented service delivery system.***

The traditional fee agreement structure was a linear design that required the DVRS counselor to fit the client to the service selected, with very little latitude in how that service was delivered. The Menu of Services design allows the DVRS counselor and the Vocational Rehabilitation (VR) eligible client to select from a menu those services and outcomes necessary to achieve the employment goal. The menu design permits flexibility and selection within services and outcomes, allows clients to switch between services, and tailors a service delivery program to the needs of the client.

#### ***Goal 2: Develop a more equitable payment reimbursement system as outcomes occur.***

The traditional fee agreement reimbursement system was not based upon an analysis of the partner's costs. The Menu of Services outcome payments are based upon a careful study of the true unit costs to deliver services. A six-month pilot project will occur between October 1, 2002, and March 31, 2003. CRPs will track units or time, and costs related to achieving outcomes. The collaboration of DVRS and CRPs in analyzing an overlay system while operating the traditional fee agreement system is expected to provide information for assigning equitable service fees.

#### ***Goal 3: Develop a statewide system with standardized payments and quality core services.***

The traditional fee agreement system assigns service fees per CRP with a standardized fee agreement, which results in multiple agreements per service, per CRP, with a variety of service fees and ranges. The Menu of Services system will utilize the financial pilot project data to develop a standardized statewide cost and service system. The unique feature of the menu concept is that the traditional continuum of services offered by CRPs is folded into the menu by identifying common activities and defining quality to create selection and choice.

***Goal 4: Improve collaboration and communication among DVRS counselors and CRP providers.***

The traditional system has placed the DVRS counselor in an unfortunate position of being perceived as the financial resource, and often the receiver of directions and expectations, rather than a participant in the client's program. The Menu of Services design enhances collaboration and capitalizes upon the DVRS counselor's expertise in employment issues and advocacy of informed client choice. The menu design requires the DVRS counselor to be intricately involved in the selection, the decision-making, and the advocacy with the client and the CRP provider.

# Philosophy

## **Roles and Responsibilities**

The cornerstone of the Menu of Services is a partnership formed by the person receiving services (client), the Iowa Division of Vocational Rehabilitation Services (DVRS) and the Community Rehabilitation Provider (CRP). The purpose of this partnership is to assist the client to achieve employment goals that are consistent with his/her preferences, strengths and needs. The Menu of Services is a DVRS counselor and client-driven, outcome-oriented process designed to facilitate the collaboration within the partnership and result in the client obtaining employment. The goal of the partnership is to assist the client in becoming employed and productive through mutual respect and clearly defined roles and responsibilities.

## **DVRS Counselor**

The DVRS Counselor assumes many roles in serving a diverse caseload. Counselors serve students in transition, adults with disabilities, individuals with a variety of disabling conditions of varying severity; and partner with schools, hospitals, community organizations, community rehabilitation programs, and various other providers. The counselor is expected to determine if an individual is eligible to receive services through DVRS. Collaboratively the counselor explores with the client those interests, preferences, aptitudes, achievement, and transferable work skills of the client to jointly develop an individualized plan reflecting informed client choice. The expectation is that the counselor will work in partnership to assist the client in achieving the employment goal identified on the Individual Plan for Employment (IPE). A counselor, working in partnership, assumes the following responsibilities in implementing the Menu of Services:

- ❖ Establishes DVRS eligibility and placement on the waiting list;
- ❖ Develops an IPE with active and eligible clients;
- ❖ Advocates for and with clients in obtaining services to meet the client's needs;
- ❖ Counsels clients to develop career awareness, self-advocacy, and other needed skills;
- ❖ Selects and arranges for services and outcomes to assist the client in skill development and employment;
- ❖ Monitors and tracks completion of the quality indicators and the accomplishment of the outcome(s);
- ❖ Arranges for payment in a timely manner;
- ❖ Provides consultation for job placement;
- ❖ Assesses stabilization of the job and appropriateness of DVRS case closure;
- ❖ Assesses the need for post employment services at closure;
- ❖ Monitors and verifies successful outcomes in coordination with the CRP provider;
- ❖ Provides technical assistance to the CRP provider;



- ❖ Assesses client's needs;
- ❖ Communicates with CRP provider;
- ❖ Collaborates with partners on issues that arise;
- ❖ Serves as a liaison between the local CRP provider and DVRS state office;
- ❖ Promotes successful application of the Menu of Services partnership.

### **CRP Provider**

The local CRP provider works in partnership with the DVRS counselor and the client to meet the identified needs of the client. Depending upon the needs identified, and the services the DVRS counselor and client determine as necessary, the CRP provider assumes many responsibilities. The provider:

- ❖ Reviews referral information to determine if the CRP has the appropriate services to meet the client's needs;
- ❖ Assesses the clients interests, aptitudes, preferences, achievement, and transferable skills to provide an appropriate recommendation, utilizing local labor market information, for an employment goal;
- ❖ Coordinates and conducts comprehensive planning meetings, when requested by DVRS counselor, to develop an intricate enhanced plan that addresses the client's needs in living, learning and working environments;
- ❖ Develops assessment sites and jobs within the local community;
- ❖ Provides follow up to determine the client's stabilization on the job;
- ❖ Provides job coaching at the level identified by the partnership to assist the client to learn the job and achieve stabilization;
- ❖ Markets the client to employers;
- ❖ Documents successful completion of the quality indicators and produces the required outcomes;
- ❖ Encourages client's success at work;
- ❖ Provides crisis intervention if necessary;
- ❖ Provides training as identified;
- ❖ Obtains appropriate signatures on release of information and Statement of Stabilization Verification forms;
- ❖ Monitors client performance, outcomes, and timely payments;
- ❖ Coordinates completion of annual satisfaction survey and submits information to DVRS Data Analyst.

### **Individual Receiving Services**

The individual receiving services through DVRS (the client) is a partner and the focus in the Menu of Services process. The client in collaboration with the DVRS counselor selects the services and outcomes necessary to assist in achieving the client's employment goal. The client:

- ❖ Explores career opportunities and vocational aspirations to make an informed client choice;
- ❖ Identifies needs and works with the DVRS counselor to address them;
- ❖ Participates and is actively engaged in services that were identified to meet the client's needs;
- ❖ Advocates for him/herself to develop an appropriate IPE and obtain employment consistent with the IPE;
- ❖ Communicates regularly with the DVRS counselor and CRP provider regarding progress;
- ❖ Listens and implements the employer, DVRS counselor, and CRP provider advice and guidance when it will enhance employability and job retention;
- ❖ Actively participates and is responsible for achieving an employment outcome.

### **Collaboration**

Collaboration between all partners is a key component to the successful implementation of the Menu of Services agreement. Partners work together to identify specific needs and skills, as well as goods and services that are required to meet those needs. While DVRS counselors and CRP providers are familiar with goods and services that meet the need, the value in the client participating in researching the options is critical to success. While professional staff may need to assist the client in setting up initial appointments, identifying transportation options, completing paperwork, obtaining documentation, problem resolution, service coordination, following through on responsibilities, etc., the entire process should be a learning experience so clients may better advocate for themselves.

Effective collaboration and teamwork is the direct result of relationship building. Frequent communication and follow up among partners allows all involved to focus on shared goals. Consistent communication enhances trust and encourages involvement so that problem solving proactively addresses situations before they evolve into insurmountable issues.

# Menu of Service Features

## **Definitions**

Some terminology in the Menu of Services may be new to participants and require some explanation in order for the process and components to be understood.

### **Accreditation:**

The basis of accreditation is to determine how the process and procedures the organization has developed are producing positive outcomes in the lives of the persons served, the organization and the community. It is the industries recognition of a quality service or program. It is the policy of the DVRS to use Community Rehabilitation Programs that are accredited by appropriate accreditation organizations, such as Certification and Accreditation of Rehabilitation Facilities (CARF), the Accreditation Council on Services for People with Developmental Disabilities (ACDD), and the Joint Accrediting Commission for Health Organizations (JACHO). The DVRS will apply its own standards to those programs, which are in the process of becoming accredited.

### **Milestones:**

are events or services that trigger specific activities that lead to an outcome.

### **Quality Indicators:**

are specific activities and actions that must occur before the milestone has been completed. The completion of quality indicators identifies when the final outcome has been accomplished.

### **Outcome(s):**

is the product for which payment is generated.

### **Outcome Payment:**

is the payment that is provided in exchange for the product.

If CARF is selected as the accrediting agency, the following is a guide to select the CARF program standard to apply to the DVRS vocational service.

Comprehensive Vocational Evaluation

- Comprehensive Vocational Evaluation (Code D4)

Organization Employment Services

- Facility Work Site Assessment (Code D5)

Employment Planning Services

- Community Work Site Assessment (Code D2 and D3)
- Career Exploration & Job Shadowing Assessment (Code D7 or D8)
- Enhanced Planning (Code D9)
- Enhanced Planning Amendment (Code D10)

Employment Skills Training

- Occupational Skills Training (Code D11)

Employee Development Services

- Work Adjustment (Code D12)
- Job Seeking Skills (Code D13)

Organizational Employment Services

- Transportation (Code D14)

#### Community Employment Services

- Job Development (Code D15)
- Job Follow Up (Code D16 and D17)

#### Community Employment/Job Site Training

- Selective Job Coaching (Code D18 and D19)
- #### Community Employment/Job Site Training, Job Supports
- Supported Job Coaching (Code D20-D23)

### **Staff Credentials**

DVRS requires the following credentials for individuals providing these services:

#### Certificate of Completion from Employment Specialist Training Program

- Community Work-Site Assessment
- Job Development
- Job Follow-Up
- Job Coach Training
- Selected Job Coaching
- Supported Job Coaching

#### Vocational Specialist or Certified Vocational Evaluator

- Comprehensive Vocational Evaluation

#### Must have the credentials, as required by the community rehabilitation program

- Facility Work-Site Assessment
- Work Adjustment
- Job Seeking Skills
- Transportation

### **Process**

The Menu of Services is an agreement between DVRS and the CRP, which insures that the client's needs drive the planning and service delivery process. The focus on the needs of the client, rather than what is available to serve the client, drives the flexibility, selection, and planning between and within milestones (services). DVRS counselors and clients determine which outcomes are needed in order for the client to progress forward in reaching the goal as identified on the Individual Plan for Employment (IPE). The DVRS counselor and client refer their questions and service requests to the CRP, which determines if it has the capacity to provide answers and work in partnership with the counselor and the client. When the CRP accepts the client, and the client is enrolled in services with the CRP, then the DVRS counselor authorizes those outcomes necessary to assist the client in achieving his/her goal(s). The flexibility of the menu is reflected by the client-need-based nature of the system:

- ❖ A client and DVRS counselor may select all outcomes within a milestone or specific outcomes.
- ❖ A client and DVRS counselor may decide to switch between milestones or outcomes.

- ❖ A client and DVRS counselor may decide to switch or add another milestone or outcome after achieving one outcome in a specific milestone.

Reports that are written and submitted as outcomes should describe the quality indicators that were accomplished in addition to other pertinent information necessary to enhance the client's and DVRS counselor's understanding of the questions asked. Payment for the reports are released once the CRP has satisfactorily completed the milestone as described by the quality indicators and has provided the information to the Division of Vocational Rehabilitation Services counselor and client. If a quality indicator is not met, the DVRS counselor may grant an exception for payment if he/she feels that not attaining the quality indicator was outside the control of the CRP.

The Menu of Services is a DVRS counselor and client-driven, outcome-oriented process. There are four broad categories from which the counselor and client may choose one outcome or a combination of outcomes:

- ❖ **Referral**

- ❖ **Assessment**

- Community Worksite Assessment
- Comprehensive Vocational Evaluation
- Facility Worksite Assessment
- Career Exploration and Job Shadowing

- ❖ **Enhanced Planning**

- ❖ **Placement**

- Vocational Preparation
  - ✓ Work Adjustment Training
  - ✓ Job Seeking Skills Training
  - ✓ Transportation Training
- Job Development and Follow Up
- Job Coaching
  - ✓ Selected
  - ✓ Supported

# Referral

At referral the counselor and client select from the menu of services the outcomes determined as essential for meeting the client's needs to reach employment (Status 26-0). The DVRS counselor refers the client to the CRP for the outcomes selected. The CRP determines if it has the capacity to serve the client and meet the client's needs. The referral to a CRP does not have to begin with Assessment and then progress through all of the service options. Instead the services selected are based upon existing information and what services are necessary for the client to reach employment. Examples of the menu design's flexibility are as follows:

- ❖ A counselor and client may determine a need for an assessment; or
- ❖ The counselor and client may feel that an assessment isn't necessary (or had already been done) thus bypassing assessment and selecting options from the placement category; or
- ❖ The counselor determines that the Job Coach Assessment report isn't needed but does desire to authorize only the remaining outcomes in supported job coaching.

Given the flexibility of the menu design it is important that the partnership recognize that the milestones are not linear and required, but rather are menu items that may be selected according to client needs.

## **Referral (Code D1)**

The purpose of the referral is to exchange information to determine if the CRP's services and outcomes are an effective resource to assist the client to meet employment objectives. **A referral is defined as that point in time when a DVRS counselor submits to the CRP:** a client's name, CRP referral packet and documentation of the client's disability with signed release forms and identifies milestones anticipated. The referral is the point of entry for necessary services and outcomes. A referral payment is provided one time per CRP, per client, not per service or milestone. A subsequent referral payment is authorized only if the DVRS case has been closed for one year prior to the subsequent referral. An outcome payment is only provided when:

- ❖ A client is accepted for services;
- ❖ A start date is identified by the CRP; and
- ❖ The DVRS counselor and client agree to and accept the date.

If the client is not accepted the CRP will explain the admission criteria that has not been met and what the counselor and client need to accomplish to be eligible for re-consideration or alternative programming. Payment is only generated at the point of acceptance when an identified start date is agreeable to the DVRS counselor and client. The following table depicts the referral process and payment point:

<b>Milestones</b>	<b>Quality Indicators</b>	<b>Outcome:</b>
<b>(Code D1) Acceptance</b> Referral from DVRS to CRP.	Documentation of disability and client information in referral packet received by CRP.	
	Team meeting with CRP to include DVRS counselor, CRP, client, or CRP and client.	
	Team identifies services needed to serve the client.	
	CRP completes a client intake, reviews background information, learns about the client needs, and client is oriented to CRP.	
	Decision by CRP to accept or reject.	
	CRP accepts client and identifies a start date for services.	Acceptance Notification:     \$ Client is accepted and DVRS counselor and client agree to a specific start date.

*Summary Note: Although referral activities may be repeated, the CRP is eligible for only one referral payment per client per period the individual's DVRS case record is open. A subsequent referral payment may be authorized only if the DVRS case has been closed for one year prior to the subsequent referral. All of the indicators must be met.*

# Assessment Services

The counselor and client may select those milestones that the DVRS counselor and client believe provide the type of experience and generate the quality of information necessary to develop a comprehensive vocational plan that will lead to employment. Menu items from the Assessment category that may be selected are:

- ❖ Community Work Site Assessment
- ❖ Comprehensive Vocational Evaluation
- ❖ Facility Work Site Assessment
- ❖ Career Exploration and/or Job Shadowing Assessment

A DVRS counselor and client may determine that only one specific assessment is necessary to answer their questions and identify outcomes needed to reach employment. A DVRS counselor and client may select any combination of assessment methodologies to determine an employment goal. At any point in time a DVRS counselor and client may decide to add an additional assessment or participate in the Enhanced Planning. While it is preferable that these activities occur prior to placement activities, there may be occasions in which revisiting one or both of these milestones is necessary.



### **Community Work Site Assessment (Code D2 and D3)**

The purpose of a Community Work Site Assessment is to assist the client and DVRS counselor in determining vocational options, direction, goals and training strategies. This type of assessment is defined by the location and methodology used in the assessment:

- ❖ The assessment is conducted in the community at one or more work sites in businesses or industries that are integrated;
- ❖ The CRP arranges for the evaluation to occur at a business that is representative of the type of work agreed upon;
- ❖ The CRP and employer provide the training, assessment, and supervision at the worksite;
- ❖ The individuals with disabilities work along side non-disabled individuals;
- ❖ The client receives a subsidized wage, paid by the CRP, while engaging in real work completed at the community business; and
- ❖ The evaluators and the employer assess the client's strengths and needs relative to those of a competitive worker and report the results in a team meeting.

The Community Work Site Assessment may be an effective method to assess an individual's ability to benefit from DVRS services. This assessment methodology may be one of the Trial Work Experiences required under the Rehabilitation Act as amended.

The following table describes the process and payment points for this type of assessment:

Milestone	Quality Indicators	Outcome
<b>(Code D2)</b> Community Work Site Assessment	Counselor and client questions identified.	
	Assessment Plan Developed.	
	Community Assessment Site identified and developed.	Outcome Payment: \$ Written identification of business, contact person, job assignment and agreement on start date per site.
<b>(Code D3)</b> Community Work Site Assessment	Assessment with community employer with subsidized wage.	
	Staffing held, questions addressed.	
	Final report site assessment communicated.	Outcome Payment: \$ Community Work Site Report.

*Summary Note: Assessment provided at an enclave (three or more individuals supervised by the same CRP staff person at the same site) is not covered under this service. Enclaves are included in Facility Work Site Assessment.*

*There can be multiple payments for D-2, but only one payment for D-3, Community Work site Final Report.*

### **Comprehensive Vocational Evaluation (Code D4)**

The purpose of a Comprehensive Vocational Evaluation is to identify vocational options available in the local labor market, client's transferable skills for possible employment options, and identifies possible training programs that would lead to compatible employment. Comprehensive vocational evaluation services provide an individualized and systematic process by which a person seeking employment, in partnership with an evaluator, learns to identify viable vocational options and develop employment goals and objectives.

This comprehensive assessment process utilizes work samples, paper and pencil tests, psychometric testing, and/or situational assessments to determine the client's interests, preferences, aptitudes and needs. The service provides vocational recommendations relative to labor market information and disability issues.

This type of assessment is defined by the methodology and techniques used to provide comprehensive vocational evaluation services:

- ❖ Assessment of functional/occupational performance in real or simulated environments;
- ❖ Use of work samples;
- ❖ Use of the employment exploration model;
- ❖ Use of Psychometric testing;
- ❖ Use of preference and interest inventories;
- ❖ Administration of personality testing (if requested);
- ❖ Extensive personal interviews;
- ❖ Analysis of prior work experience and transferable skills; and
- ❖ Other appropriate evaluation tests, (depending on the individual).

The following table summarizes the quality indicators and outcomes:

Milestone	Quality Indicators	Outcome
<b>(Code D4)</b> Comprehensive Vocational Evaluation	DVRS counselor and client have identified questions and communicated them to the CRP.	
	Assessment Plan and timeline developed.	
	CRP identifies what methodology and tools will be needed to answer questions, and will identify vocational options consistent with labor market information and transferable work skills.	
	Testing is completed by certified vocational specialist or certified vocational evaluator or certified to administer the tests.	
	Information shared and questions addressed.	
	Assessment results analyzed and communicated to client.	Outcome Payment:     \$ Final Report

### **Facility Work Site Assessment (Code D5)**

This is an assessment done in the facility or in an enclave where the client's work habits and behaviors, dexterities and motor skills, and work pace are assessed using real paid work or simulated work. The purpose of the assessment is to determine the client's ability: to work at a competitive rate, identify the client's transferable skills, determine the client's work habits and behaviors, and provide recommendations for employment.

This type of assessment is defined by the location and methodology used in evaluating the client:

- ❖ The counselor and client identify questions to be answered;
- ❖ The CRP provides training and supervision at the facility or enclave; and
- ❖ The CRP pays the client a commensurate wage for all hours worked.
- ❖ The CRP uses paid work, or simulated work if requested by the DVRS counselor, to assess the client's ability to work in various employment settings.

The following table summarizes the quality indicators and outcomes that must be met:

Milestone	Quality Indicators	Outcome
<b>(Code D5)</b> Facility Work Site Assessment	Counselor and client questions identified.	
	Assessment Plan Developed.	
	Assessment on paid work or simulated work in the facility or enclave.	
	Assesses client's work habits, work tolerance, behaviors, general employa- bility skills, dexterities, motor coordination, work pace.	
	Information shared and questions addressed.	
	Assessment results communicated.	Outcome Payment:      \$ Facility Work Site Final Report

**Summary Note.** "Facility" is defined as any location owned or leased by the CRP. It includes enclave evaluations.

### **Career Exploration and Job Shadowing Assessment (Code D7 or Code D8)**

The purpose of this assessment is to provide informed client choice and identify occupations of interest to the client. The assessment utilizes experiential learning opportunities both in the community with local employers (job shadowing), and may include a computerized career search.

This type of assessment is defined by the purpose for, the methodology used, and the locations in which the assessment occurs:

- ❖ Career exploration is designed to assist a person seeking employment to learn about employment opportunities within the community and to make informed decisions;
- ❖ The services are individualized to assist a person to choose employment outcomes and/or career development opportunities based on his or her preferences, strengths, abilities, and needs;
- ❖ Career exploration is a process in which the client and the CRP staff research, through various media, labor market information, occupational skill requirements, wage data, occupational projections and training providers;
- ❖ Job Shadowing is a process where the CRP develops opportunities for the client to explore real jobs in real work settings within an integrated community business to determine if the job is consistent with the client's interests, abilities, and aptitudes.

Career exploration and job shadowing enriches the client's rehabilitation experience and assists the counselor and client in identifying occupations and training programs that match the client's disability and abilities.

The following table summarizes the quality indicators and outcomes that must be achieved:

Milestone	Quality Indicators	Outcome
<b>(Code D7)</b> Job Shadowing Assessment	CRP identifies employers for job shadowing and arranges experience with local business(es). Client starts job shadowing assessment.	Outcome Payment: \$ Reporting form identifies business, start date, jobs shadowed per site, and outcome statement.
<b>(Code D8)</b> Career Exploration	Counselor and client questions identified.	
	Assessment Plan Developed.	
	Career exploration may include: computerized assessment, information interviews, internet research on careers, and/or labor market information, etc.	
	Information shared, questions addressed.	
	Assessment results communicated.	Outcome Payment: \$ Career Exploration Final Report (incorporates D7 outcome if used.)

***Summary Note: D-7 may be purchased alone.***

# Enhanced Planning

Enhanced planning is a service that the DVRS counselor may request when conflicting and multiple issues are preventing the client from moving forward toward employment. Generally there are multiple issues involved that compete with one another causing the client and team members to feel torn between equally important directions. Enhanced planning does not replace the traditional planning that the CRP and DVRS counselor are required to do. Enhanced planning considers the issues in the client's life related to his/her living, learning, and working environments. The following is an example of when enhanced planning may be of value:

- ❖ The client's TANF worker requires the client to attend appointments and meetings that are during the period of time that the CRP requires the client to be at a community work site assessment. The TANF worker is requiring the client to get a job. The DVRS counselor and client agree that the community work site assessment is necessary to determine an appropriate goal and the client's skills and abilities. In addition, the client is required to attend a class on parenting that meets during this same time. The housing staff requires the client to participate in cooking and cleaning classes that immediately follow the parenting class schedule. The client's family expects the client to help support their home and assist with general cooking and cleaning. The client has been dedicating a large portion of the SSDI income to the family budget, and instead refrains from purchasing general health and hygiene products to stretch his budget. The client's dog was picked up by the dogcatcher for running loose causing the client to receive a fine. The client's mental health therapist is leaving town and the client refuses to work with another professional.

The example above describes a number of competing influences that without a concerted and coordinated effort will result in inadequate planning and lack of progress toward employment. Enhanced planning develops a plan that considers all of the competing forces, develops strategies and collaboration to improve the outcomes, and identifies roles, responsibilities and funding avenues.

If a CRP wants to provide this service, their staff and VR counselors must attend DVRS training.



### **Enhanced Planning (Code D9)**

Enhanced Planning is defined as a series of intense client-focused team meeting(s) for the purpose of gathering and sharing information about a client's current educational/vocational levels, transferable work skills, abilities, interests and employment needs. The team members should consist of the DVRS counselor, CRP staff, case manager, client and anyone whom the client chooses to have present -- those individuals who might be involved in the client's living, learning, and/or work environment. The expected outcome of the Enhanced Planning meeting(s) is to develop an Enhanced Plan that will address the employment needs of the client. The plan strongly identifies the client's strengths, interests, preferences and employment goal(s). In addition, the plan should identify the realistic challenges and the accommodations and worksite supports needed. The enhanced action plan should clearly review past activities that have been unsuccessful or successful in obtaining the client's employment goals. The plan will identify the methods/activities to be used to assist the client to make an informed choice in the selection of an employment goal. The individuals responsible in assisting with the various activities of the plan (friends, neighbors, relatives, CRP staff or other identified community supports) should be identified as well as the projected time and dates to accomplish the activities. The Enhanced Plan must be acceptable to the client and the DVRS counselor.

The difference of "Enhanced Planning" from the regular planning that occurs in this process is defined by the collaboration of the team and the plan that is developed according to the following:

- ❖ An enhanced plan is developed to address all of the issues that impact employment that cannot be addressed by the traditional process;
- ❖ This process includes a series of team meetings to gather and share information about the client's current vocational abilities, work skills, interests and employment needs.
- ❖ Team members are the client, DVRS counselor, CRP representative(s), case manager and anyone whom the client chooses to have present.
- ❖ The plan identifies:
  - ✓ The client's strengths, interests, preferences and employment goal(s);
  - ✓ The client's functioning in living, learning and working environments;
  - ✓ The realistic challenges and the accommodations and work site supports needed for the assessment activities and employment;
  - ✓ The past activities that have been successful or unsuccessful in obtaining the client's employment goals;
  - ✓ The methods and activities to be used to assist the client to make an informed choice in the selection of an employment goal;

- ✓ The individuals responsible in conducting or assisting with the plan;
- ✓ The projected time and dates to accomplish the activities.

The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestones	Quality Indicators	Outcomes
<b>(Code D9)</b> Enhanced Planning	Counselor and client questions identified.	
	Comprehensive Team Planning with CRP, family, client, case manager, and DVRS counselor, and (if appropriate): residential staff, educational staff, therapist, and others.	
	Identification of: client's strengths, interest, preferences, and employment goal; challenges, and accommodations with needed work site supports; past activities (if appropriate) that have been successful or unsuccessful in obtaining employment; assessment methods, and activities used to assist in developing informed client choice; roles, and responsibilities for the plan's activities; projected time, and dates for accomplishing the activities; needs and strategies to address issues in the living, learning, and working environments.	Outcome Payment: \$ Enhanced Plan Written to address all need areas, and identifies strategies of support, payment sources for non-vocational needs, and long-term funding needs, etc.

### **Amended Enhanced Plan (D10)**

If the DVRS counselor and the client realize after having followed the enhanced plan that circumstances in the client's life have changed, and different issues and strategies must be addresses, then it is permissible to consider developing an amended enhanced plan. The defining feature of an amended plan is that substantial changes have happened in the client's life resulting in the initial plan to no longer address the client's needs, **and** substantial changes are necessary and required in order for the team to move forward. An amended plan would result in an entirely **new and different** plan. If the team is able to address the changes with simple collaboration, then an amended plan would not be warranted.

Milestones	Quality Indicators	Outcome:
<b>(Code D10)</b> Enhanced Planning Amendment	Planning team identifies the new issues and problems that require the team to reconvene and develop an amended plan.	
	Amended plan reviews unsuccessful implementation of previous plan and provides new strategies to address issues.	
	Amended plan includes: client's strengths, interests, preferences and employment goal; realistic challenges and accommodations with work site supports needed; past activities (if appropriate) that have been successful or unsuccessful in obtaining employment; assessment methods and activities used to assist in developing informed client choice; roles and responsibilities for plan activities; projected time and dates for accomplishing the activities; needs and strategies to address issues in the living, learning, and working environments.	<b>Outcome Payment: \$</b> <b>Enhanced Plan Amended and Written to address quality indicators.</b>

***Summary Note. The Enhanced Plan menu item may be purchased at any time after referral. It may be considered a form of assessment or it may be authorized at another time. It may be authorized as a stand-alone service or be purchased as an overlay with assessment or placement services.***

# Placement Services

The counselor and client may select those milestones that the DVRS counselor and client believe provide the type of experience necessary to obtain a job consistent with the individual plan for employment. Placement Services include those activities that provide training to assist the client in obtaining employment, as well as active job search, development, coaching and follow up activities necessary to obtain or maintain employment. Each outcome listed within the Placement Menu may be authorized separately or in conjunction with other outcomes. Placement Menu categories are:

- ❖ Vocational Preparation;
- ❖ Job Development and Follow Up;
- ❖ Selected Job Coaching;
- ❖ Supported Job Coaching.

### **Vocational Preparation**

Vocational preparation services prepare a client for employment. The goal of Vocational Preparation is to enhance and improve a client's ability to perform specific work, learn the skills necessary to do a specific job, minimize negative work habits and behaviors that impede job retention, develop skills in finding a job, and learn how to navigate transportation systems to get to and from work.

### **Work Adjustment Training (WAT) (Code D12)**

Work Adjustment Training is a training program that remedies negative work habits and behaviors, improves work tolerance, and develops strategies to improve a client's ability to maintain employment. The purpose is to enhance the client's ability to find and keep a job. Work adjustment may be used as part of a Trial Work Experience. When it is used for this purpose it must be conducted in the community at a competitive business and the client must receive a competitive wage. If used in this manner, the counselor may decide to also authorize for Job Development services unless the counselor develops the trial work site.

The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestones	Quality Indicators	Outcomes
(Code D12) Work Adjustment Training	Barriers Identified.	
	Strategies Identified.	
	Training Implemented.	
	Recommendations for Job Placement Planning.	
	Information shared, questions addressed, and outcomes communicated.	Outcome Payment \$ Written Report inclusive of Quality Indicators and Recommendations. (Completion is not required for payment.)

**Summary Note:** *A work enclave can be used for WAT, but not if it is a Trial Work Experience.*

### **Job Seeking Skills Training (Code D13)**

Job Seeking Skills Training teaches the client strategies necessary to find employment. The purpose of Job Seeking Skills Training is to teach the client how to find a job with assistance at a level required by the client's needs and how to apply these strategies to get a job in the future if necessary.

Job Seeking Skills Training is defined by the instruction the participants receive as listed below:

- ❖ Writing a resume;
- ❖ Interviewing;
- ❖ Completing applications;
- ❖ Writing follow up letters;
- ❖ Accessing the hidden job market;
- ❖ Discussing disability issues;
- ❖ Understanding ADA rights in the interview process;
- ❖ Making cold calls;
- ❖ Practicing through mock interviews;
- ❖ Preparing for work through job readiness, etc.

The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestone	Quality Indicators	Outcomes
<b>(Code D13)</b> Job Seeking Skills Training	Barriers Identified.	
	Strategies Identified.	
	Training Implemented.	
	Recommendations for Job Placement Planning.	
	Information shared, questions addressed, and outcomes communicated.	Outcome Payment        \$ Written Report inclusive of Quality Indicators and Recommendations.

### **Transportation Training (Code D14)**

Transportation training teaches the client how to use mass transit to get to and from work. The training includes learning the bus routes appropriate for the client, practice using the bus system with the assistance of a coach, and successfully navigating mass transit demonstrated by independent trials.

The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestone	Quality Indicators	Outcomes
<b>(Code D14)</b> Transportation Training	Barriers Identified.	
	Strategies Identified.	
	Training Implemented.	
	Recommendations for Job Placement Planning.	
	Information shared, questions addressed, and outcomes communicated.	Outcome Payment \$ Written Report inclusive of Quality Indicators and Recommendations

***Summary Note: This service is not intended to teach a client to drive a vehicle.***

### **Job Development and/or Job Follow Up**

The Job Development and/or Job Follow Up outcome(s) may be authorized alone or with any of the other placement outcome(s) whenever a counselor is in need of a vendor to develop a job with the client. For example, if the employment plan calls for supported job coaching and the counselor and client want the provider to assist him/her with job development, then the job development outcome would be authorized along with the supported coaching outcome(s). Job Development and/or Job Follow Up as a stand alone service would only be authorized as a solitary service when:

- ❖ Counselors have a large caseload, defined by the office supervisor; or
- ❖ The counselor serving the caseload is an itinerant counselor filling in on a vacant caseload.

### **Job Development (Code D15)**

The purpose of job development is to place a client on a job in the community working for a business where persons with disabilities are integrated into the workforce. It may be used alone or in conjunction with another milestone or outcome. When used separate from selected job coaching or supported job coaching, the counselor must obtain an exception approval from the area office supervisor.

Job development is defined by the following:

- ❖ The CRP identifies available job openings consistent with the client's disability, interests, preferences, aptitudes, and individual plan for employment;
- ❖ The CRP and client maintain a job search log of employers contacted;
- ❖ The CRP staff contact employers to develop a job specific to the client's IPE;
- ❖ The CRP completes a job site and work station analysis (if necessary);
- ❖ The CRP markets the client to the employer;
- ❖ The CRP accompanies the client to interviews (if necessary);
- ❖ The CRP assists the client in completing and submitting job applications;
- ❖ The CRP advises the client on interviewing, resume revisions, and follow up;
- ❖ The CRP recommends work station modifications (if necessary);
- ❖ The CRP develops a job for the client with a business or industry that pays commensurate wage at or above minimum wage and offers benefits (whenever possible).



Job coaching on the job and follow up are not included in Job Development. Those services are authorized separately. The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestone	Quality Indicators	Outcomes
<b>(Code D15)</b> Job Development Status 20 or 186/187	Team identifies specific activities necessary for placement.	
	Specific responsibilities to complete activities identified in written placement plan.	
	Contact businesses compatible with the IPE to develop a job.	
	Job developed.	
	Client placed on the job.	Outcome Payment \$ Written Placement Report inclusive of Quality Indicators and Wage/ Benefits Information.

***Summary Note: Job Development authorization for supported job coaching requires identification of long-term supports prior to development of the plan.***

### **Job Follow Up (Code D16 and D17)**

The purpose of job follow up is to monitor a client's performance on the job when the client is placed without any job coaching services. The outcome of the job follow up is that the client maintains employment evidenced by the employer's signature verifying that as of that date the job is stable and client's performance is suitable.

The job follow up services require that the CRP maintain regular contact with the employer during the 90-day period after the initial job placement. Job follow up services may be necessary when there are questions on the client's:

- ❖ Ability to maintain employment;
- ❖ Need for accommodations; and
- ❖ Need to provide training strategies to the employer.

The following table summarizes the quality indicators and outcomes that must be accomplished:

Milestone	Quality Indicators	Outcomes
<b>(Code D16)</b> Job Follow Up Status 22	Establish follow-up strategies.	
	Regular contacts per agreed strategies.	
	Problems that arise are discussed with DVRS counselor to implement strategies.	<b>Outcome Payment \$ 45 day written report after placement.</b>
<b>(Code D17)</b> Job Follow Up Status 26	Follow up reduced to monthly.	
	Client is an employee, working in a suitable job, and the job is stable.	<b>Outcome Payment \$ 90-day written report, Employer Signature.</b>

***Summary Note: If client keeps job, but moved to job coaching, outcome payment is made. If the client does not want the employer to be contacted, this service is not appropriate.***

## ***Job Coaching Training***

Job Coaching Training includes services that assist the client in learning the job specific skills and work habits and behaviors while employed on the job in the community. The DVRS counselor and client may capitalize on the flexibility of the menu if different services than those originally planned are discovered as necessary by switching between outcomes. When a DVRS counselor and client determine that additional or different services are necessary, payment is authorized only for those outcomes accomplished. Job Coaching Training does not include job development. Job Development is a separate service that may be purchased from the menu. The purpose of Job Coaching Training is to train the client while employed at a competitive business and provide the necessary support and follow up until the client is satisfactorily employed (Status 26-0).

The coaching service milestones require the counselor and client to select (during the development of the employment plan), those outcomes that are necessary for the client to achieve employment:

- ❖ Selective coaching is only provided when the counselor and client determine that the client may need some job coaching, but will work independently without coaching by the time the DVRS case file is closed.
- ❖ Supported coaching is only selected when the counselor and client determine that the client will need on-going support and follow-up, **and** have obtained the necessary long-term follow-up through the appropriate funding entity. When using natural supports, a plan is developed and agreed to by all parties that identifies the CRP's responsibility in providing assistance to the employee and/or employer to maintain the job.

***Note: Time limited, hourly job coaching will be developed under a separate agreement.***

### **Selected Job Coaching (Code D18 and D19)**

The purpose of selected job coaching is to provide training either on the job or away from the worksite by a job coach who has specialized skill in training individuals with disabilities to learn the specific work tasks, work habits and behaviors. Selected job coaching is appropriate for clients who are able to eventually work independent of job coaching. It is expected that the client will become competitively employed in a job compatible and satisfactory to the client and is consistent with the individual plan for employment. Selected job coaching may be defined by:

- ❖ The client requires minimal prompting and guidance in addressing work habit and behavioral difficulties.
- ❖ The coach works with the employer to understand the training needs of the client.
- ❖ The coach provides training strategies to the employer so that the employer may provide future training once the DVRS file is closed.
- ❖ The coach analyzes the work site and workstation to arrange appropriate accommodations for the client on the job.
- ❖ The job coaching is a time limited service in which long-term support isn't necessary in order for the client to maintain employment.
- ❖ The quantity of job coaching for one-on-one training, while the client is learning the job, will last until the skills are learned.
- ❖ The job is considered permanent and stable once the job coaching has faded and the employer is satisfied with the client's performance on the job.
- ❖ The job coaching may be resumed after the job is considered stable if additional training for new assignments is necessary.

The following table summarizes the quality indicators and outcomes that may be selected:

Milestone	Quality Indicators	Outcome \$
<b>(Code D18)</b> Selected Job Coaching Status 187	Job Coaching Plan developed, with worksite/station analysis that is consistent with client's training needs.	
	One-on-one training occurs with the job coach until the skills are learned. Coach trains employer on training strategies and natural supports.	
	Follow up with the employer per coaching plan after the one-on-one training ends.	
Job is stable and suitable as defined by job coaching plan. Status 22	Client works independently with natural supports.	Outcome Payment \$ Stabilization Statement Form.
<b>(Code D19)</b> Client is permanently employed and no further services are needed. Status 26	Client maintains employment, employer satisfied demonstrated by client working in a suitable job, and the job is stable as evidenced by employer signature on Statement of Stabilization form.	Outcome Payment \$ Written report at minimum of 90 days follow-up. Verification form signed, wage/benefit information included after placement and stabilization.

**Summary Note:** Only one stabilization payment is authorized if the client receives selected job coaching after the stabilization statement form outcome payment if he/she requires additional coaching to reach a permanently employed status (Status 26).

### **Supported Job Coaching (Code D20 – D23)**

The purpose of supported job coaching is to provide extensive, long term job coaching to assist the client to work in an integrated setting at a business at a wage commensurate wage that is at or above minimum wage and offers benefits (whenever possible). Supported job coaching trains the client on the appropriate job specific skills, work habits, behaviors, socialization, and adjustment to the job so that the client will maintain competitive employment commensurate with the client's disability and individual plan for employment. Prior to authorizing for supported coaching, there must be an agreement to provide long-term follow up, and increase job coaching after fading if necessary. Supported Job coaching is intensive training provided on the job by a job coach who has specialized skill in training individuals with the most significant disabilities to learn the specific work tasks, work habits and behaviors to reach competitive employment. Supported job coaching requires:

- ❖ The coach works with the employer and co-workers to understand the client's disability, abilities, and special training needs so that the client becomes an integral part of the business;
- ❖ The supported job coach trains the client on how to socialize in the break room appropriately, and advocate for him/herself when needing assistance;
- ❖ The long-term support must be in place and identified in the Individual Plan of Employment (IPE);
- ❖ The long-term funding supports the service after the DVRS case file is closed;
- ❖ The client requires on the job training to address work habit and behavioral difficulties;
- ❖ The coach works with the employer to understand the training needs of the client;
- ❖ The coach provides strategies to the employer should situations occur when the coach is absent or has started fading;
- ❖ The coach analyzes the work site and workstation to arrange appropriate accommodations for the client on the job;
- ❖ The job coaching is long-term and necessary in order for the client to maintain employment.
- ❖ The individual works at a competitive job, in the integrated labor market, earning commensurate wage that is at or above minimum wage.

The following table summarizes the quality indicators and outcomes that may be selected:

Milestone	Quality Indicators	Outcomes:
<b>(Code D20)</b> Supported Job Coaching Status 186	Long-term follow up is identified and agreed to by vendor.	
	Job coach assesses the client's adaptive behaviors, work skills, habits, and socialization on the job and provides training to address needs.	Outcome Payment \$ Job Coach Assessment Written Report
<b>(Code D21)</b> Status 186	Job coach trains the employer and co-workers on clients training needs and strategies.	
	Training provided on the job, one-on-one with the client until level of job coaching that is necessary is determined by the point of stabilization.	
	Stabilization is reached when the client, employer, DVRS counselor and CRP determined that the job performance is acceptable and maintainable.	Outcome Payment \$ Employer, client, and DVRS counselor sign Stabilization Form acknowledging amount of job coaching still necessary, that the job is acceptable and maintainable, and that client is working at commensurate wage that is at or above minimum wage.
<b>(Code D22)</b> Status 22	Job coaching is provided at the level identified on the stabilization form and the client maintains suitable and stable employment.	Outcome payment \$ 45 day written report after stabilization.
<b>(Code D23)</b> Status 26	Employer and client decide that the job is stable and suitable with the amount of job coaching identified on the stabilization form. (Status 26-0)	Outcome Payment \$ 90-day written report after stabilization with business signature of stable employment.

***Note: Client loses the job at anytime prior to the 90-day outcome: The DVRS counselor and client will determine the feasibility of pursuing another employment opportunity.***

# APPENDIX A

## **REPORTING FORMS**



**[place your CRP name here]**  
**Iowa Division of Vocational Rehabilitation**  
**Statement of Stabilization/Employment Verification**

Client \_\_\_\_\_ Job Title \_\_\_\_\_

Employer \_\_\_\_\_ Supervisor \_\_\_\_\_

Address \_\_\_\_\_ Stabilization Date \_\_\_\_\_

Start Date \_\_\_\_\_

☐ Job Follow-Up: \_\_\_\_ Employment Verification (D17)

☐ Selected Job Coaching: \_\_\_\_ Stabilization (D18) \_\_\_\_ Employment Verification (D19)

☐ Supported Job Coaching: \_\_\_\_ Stabilization (D21) \_\_\_\_ Employment Verification (D23)

We agree that the above named individual's job performance is acceptable and maintainable with the available level of support. We understand that this statement is in no way a guarantee of continued employment on the part of the employer.

# of Hours for Follow-Along Per Month \_\_\_\_\_

Signatures:

\_\_\_\_\_  
Client Date

\_\_\_\_\_  
DVRS Counselor Date

\_\_\_\_\_  
Employer Date

\_\_\_\_\_  
CRP Representative Date

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Referral Acceptance Notification**  
**Code D1**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date of referral: \_\_\_\_\_

Previous date of service (if relevant): \_\_\_\_\_

Start date: \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D1	Met	
<b>(Code D1)</b> <b>Acceptance</b> Referral from DVRS to CRP	Y	N	Documentation of disability and client information in referral packet received by CRP	Y	N			
			Team meeting with CRP to include DVRS counselor, CRP, client, or CRP and client	Y	N			
			Team identifies services needed to serve the client	Y	N			
			CRP completes a client intake, reviews background information, learns about the client needs, and client is oriented to CRP	Y	N			
			Decision by CRP to accept or reject	Y	N			
			CRP accepts client and identifies a start date for services	Y	N			
					Outcome payment \$			
					Client is accepted and DVRS counselor and client agree to a specific start date.	Y	N	

**Comments:**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Community Worksite Assessment Developed**  
**Code D2**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Community Worksite Development started: \_\_\_\_\_

Name of employer/planned work site: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Name of business contact or supervisor: \_\_\_\_\_

Anticipated start date(s) of planned assessment: \_\_\_\_\_

Job assignment for planned assessment experience(s): \_\_\_\_\_

Date Submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D2	Met	
<b>(Code D2)</b> Community Work Site Assessment	Y	N	Counselor and client Questions identified.	Y	N	Outcome Payment: \$  Written identification of business, contact person, job assignment and agreement on start date per site.	Y	N
			Assessment Plan Developed.	Y	N			
			Community Assessment Site identified and Developed.	Y	N			

**Comments:**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Community Worksite Assessment**  
**Code D3**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Community Worksite Assessment started: \_\_\_\_\_

Name of employer/work site: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Name of business contact or supervisor: \_\_\_\_\_

Date Community Worksite Assessment ended: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D3	Met	
<b>(Code D3)</b> Community Work Site Assessment	Y	N	Assessment with community employer with subsidized wage.	Y	N	Outcome Payment: \$  Community Work Site Report	Y	N
			Staffing held, questions Addressed.	Y	N			
			Final report site assessment communicated.	Y	N			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Comprehensive Vocational Evaluation**  
**Code D4**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Evaluation began: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D4	Met	
<b>(Code D4)</b> Comprehensive Vocational Evaluation	Y	N	DVRS counselor and client have identified questions and communicated them to the CRP.	Y	N			
			Assessment Plan and timeline developed.	Y	N			
			Community Rehabilitation Program identifies what methodology and tools will be needed to answer questions, and will identify vocational options consistent with labor market information and transferable work skills.	Y	N			
			Testing is completed by Certified Vocational Specialist or Certified Vocational Evaluator or certified to administer the tests.	Y	N			
			Information shared and questions addressed.	Y	N			
			Assessment results analyzed and communicated to client.	Y	N			
						Outcome Payment:\$		
						Final report	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Facility Worksite Assessment**  
**Code D5**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Facility Worksite Assessment started: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D5	Met	
<b>(Code D5)</b>								
Facility Work site Assessment	Y	N	Counselor and client questions identified.	Y	N			
			Assessment Plan developed.	Y	N			
			Assessment on paid or simulated work in the facility or enclave.	Y	N			
			Assesses client's work habits, work tolerance, behaviors, general employability skills, dexterities, motor coordination, and work pace.	Y	N			
			Information shared and questions addressed.	Y	N			
			Assessment results communicated.	Y	N			
			Outcome Payment:\$					
			Facility Work Site Final Report	Y	N			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Job Shadowing Assessment**  
**Code D7**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Name of business/work site: \_\_\_\_\_

Name of business contact or supervisor: \_\_\_\_\_

Anticipated date(s) of Job Shadowing: \_\_\_\_\_

Job assignment for shadowing experience(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D7	Met	
(Code D7) Job Shadowing Assessment	Y	N	CRP identifies employer for job shadowing and arranges experience with local business(es). Client starts job shadowing assessment.	Y	N	Outcome Payment: \$	Y	N
						Reporting form identifies business, start date, and jobs to be shadowed per site, and outcome statement.		

**Outcome Statement:**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Career Exploration Assessment**  
**Code D8**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date assessment started: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D8	Met	
<b>(Code D8)</b> Career Exploration	Y	N	Counselor and client questions identified.	Y	N			
			Assessment Plan developed.	Y	N			
			Career Exploration, may include: computerized assessment, information interviews, internet research on careers, and/or labor market information, etc.	Y	N			
			Information shared, questions addressed.	Y	N			
			Assessment results communicated.	Y	N			
			Outcome Payment \$					
			Career Exploration Final Report (incorporates D7 outcome if used).	Y	N			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Enhanced Planning**  
**Code D9**

Client name: \_\_\_\_\_

Service provider name: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Participants: \_\_\_\_\_

\_\_\_\_\_

Date(s) meeting occurred: \_\_\_\_\_

\_\_\_\_\_

Additional information submitted by: \_\_\_\_\_

\_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D9	Met	
<b>(Code D9)</b> Enhanced Planning	Y	N	Counselor and client questions identified.	Y	N	Outcome Payment: \$  Enhanced Plan Written to address all need areas, and identifies strategies of support, payment sources for non-vocational needs, and long-term funding needs, etc.	Y	N
			Comprehensive team planning with CRP, family, client, case manager, and DVRS counselor, and (if appropriate): residential staff, educational staff, therapist, and others.	Y	N			
			Identification of: client's strengths; interest; preferences, and employment goal; challenges, and accommodations with needed work site supports; past activities (if appropriate) that have been successful or unsuccessful in obtaining employment; assessment methods, and activities used to assist in developing informed client choice; roles, and responsibilities for the plan's activities; projected time, and dates for accomplishing the activities; needs and strategies to address issues in the living, learning, and working environments.	Y	N			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Enhanced Plan Amendment**  
**Code D10**

Client name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Staff name: \_\_\_\_\_

Participants: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Date(s) meeting(s) occurred: \_\_\_\_\_

\_\_\_\_\_

Additional information submitted by: \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D10	Met	
<b>(Code D10)</b> Enhanced Plan Amendment	Y	N	Planning team identifies the new issues and problems that require the team to reconvene and develop an amended plan.	Y	N			
			Amended plan reviews unsuccessful implementation of previous plan and provides new strategies to address issues.	Y	N			
			Amended plan includes: client's strengths, interests, preferences and employment goal; realistic challenges and accommodations with work site supports needed; past activities (if appropriate) that have been successful or unsuccessful in obtaining employment; assessment methods and activities used to assist in developing informed client choice; roles and responsibilities for plan activities; projected time and dates for accomplishing the activities; needs and strategies to address issues in the living, learning, and working environments.	Y	N			
						Outcome Payment: \$		
						Enhanced Plan Amended and Written to address quality indicators.	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Work Adjustment Training**  
**Code D12**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Training start date: \_\_\_\_\_

Training end date: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met	
<b>(Code D12)</b>		
Work Adjustment Training	Y	N

Quality Indicators	Met	
Barriers identified	Y	N
Strategies identified	Y	N
Training implemented	Y	N
Recommendations for Job Placement Planning	Y	N
Information shared, questions addressed, and outcomes communicated	Y	N

Outcomes Payment Points Code D12	Met	
Outcome Payment: \$		
Written Report inclusive of Quality Indicators, and Recommendations (Completion is not required for payment)	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Job Seeking Skills Training**  
**Code D13**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Training start date: \_\_\_\_\_

Training end date: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D13	Met	
<b>(Code D13)</b> Job Seeking Skills Training	Y	N	Barriers identified.	Y	N	Outcome Payment: \$	Y	N
			Strategies identified.	Y	N			
			Training implemented.	Y	N			
			Recommendations for Job Placement Planning.	Y	N			
			Information shared, questions addressed, and outcomes communicated.	Y	N			
Written Report inclusive of Quality Indicators, and Recommendations.						Y	N	

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Transportation Training**  
**Code D14**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Training start date: \_\_\_\_\_

Training end date: \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D14	Met	
<b>(Code D14)</b> Transportation Training	Y	N	Barriers identified.	Y	N	Outcome Payment: \$	Y	N
			Strategies identified.	Y	N			
			Training implemented.	Y	N			
			Recommendations for Job Placement Planning.	Y	N			
			Information shared, questions addressed, and outcomes communicated.	Y	N			
Written Report Inclusive of Quality Indicators, and Recommendations						Y	N	

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Job Development/Placement**  
**Code D15**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Job Development started: \_\_\_\_\_

Name of employer: \_\_\_\_\_

Name of supervisor: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Start date: \_\_\_\_\_

Job title: \_\_\_\_\_

Job duties: \_\_\_\_\_

Start wage: \_\_\_\_\_

Hours per week: \_\_\_\_\_

Benefits (if available): \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D15	Met	
<b>(Code D15)</b> Job Development Status 20 or 186	Y	N	Team identifies specific activities necessary for placement.	Y	N	Outcome Payment: \$ Written Placement Report inclusive of Quality, Indicators and Wage/ Benefits Information.	Y	N
			Specific responsibilities to complete activities identified in written placement plan.	Y	N			
			Contact businesses compatible with the IPE to develop a job.	Y	N			
			Job developed.	Y	N			
			Client placed on the job.	Y	N			

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Job Follow Up/45 Days**  
**Code D16**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Job Follow Up started: \_\_\_\_\_

Name of employer: \_\_\_\_\_

Name of supervisor: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Job title: \_\_\_\_\_

Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_

Current hours per week: \_\_\_\_\_

Current benefits: \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Code D16	Met	
<b>(Code D16)</b> Job Follow Up Status 22	Y	N	Establish Follow Up strategies.	Y	N			
			Regular contacts per the agreed strategies.	Y	N			
			Problems that arise are discussed with the DVRS counselor to implement strategies.	Y	N	Outcome payment \$  45-day written report after placement	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Job Follow Up/90 Days**  
**Code D17**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Date Job Follow Up started: \_\_\_\_\_

Name of employer: \_\_\_\_\_

Name of supervisor: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Job title: \_\_\_\_\_

Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_

Current hours per week: \_\_\_\_\_

Current benefits: \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Code D17	Met	
(Code D17) Status 26 Job follow up	Y	N	Follow Up reduced to monthly	Y	N			
			Client is an employee, working in a suitable job, and the job is stable	Y	N	Outcome payment \$ 90 day written report Employer Signature	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Selected Job Coaching/45 Days**  
**Code D18**

Client name: \_\_\_\_\_  
 Service provider: \_\_\_\_\_  
 Staff name: \_\_\_\_\_ DVRS counselor name: \_\_\_\_\_  
 Service start date: \_\_\_\_\_

Name of employer: \_\_\_\_\_  
 Name of supervisor: \_\_\_\_\_  
 Address and zip code: \_\_\_\_\_  
 Start date: \_\_\_\_\_  
 Job title: \_\_\_\_\_  
 Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_ Hours per week: \_\_\_\_\_  
 Benefits (if available): \_\_\_\_\_  
 Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D18	Met	
<b>(Code D18)</b> Selected Job Coaching Status 187  Job is stable and suitable as defined by job coaching plan Status 22	Y	N	Job Coaching Plan developed, with work site/station analysis that is consistent with client's training needs.	Y	N	Outcome Payment \$  Stabilization statement form.	Y	N
			One-on-one training occurs with the job coach until the skills are learned. Coach trains employer on training strategies and natural supports.	Y	N			
			Follow up with the employer per coaching plan after the one on one training ends.	Y	N			
			Client works independently with natural supports.	Y	N			

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Selected Job Coaching/90 Days**  
**Code D19**

Client name: \_\_\_\_\_  
 Service provider: \_\_\_\_\_  
 Staff name: \_\_\_\_\_  
 DVRS counselor name: \_\_\_\_\_  
 Service start date: \_\_\_\_\_

Name of employer: \_\_\_\_\_  
 Name of supervisor: \_\_\_\_\_  
 Address and zip code: \_\_\_\_\_  
 Start date: \_\_\_\_\_  
 Job title: \_\_\_\_\_  
 Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_  
 Hours per week: \_\_\_\_\_  
 Benefits (if available): \_\_\_\_\_  
 Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D19	Met	
<b>(Code D19)</b> Client is permanently employed and no further services are needed Status 26	Y	N	Client maintains employment, employer satisfied demonstrated by client working in a suitable job, and the job is stable as evidenced by employer signature on Statement of Stabilization Form.	Y	N	Outcome Payment \$  Written report at minimum of 90-day follow up. Verification form signed, wage/benefit information included after placement and stabilization.	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Supported Job Coaching Assessment**  
**Code D20**

Client name: \_\_\_\_\_  
 Service provider: \_\_\_\_\_  
 Staff name: \_\_\_\_\_  
 DVRS counselor name: \_\_\_\_\_  
 Service Start Date: \_\_\_\_\_

Name of employer: \_\_\_\_\_  
 Name of supervisor: \_\_\_\_\_  
 Address and zip code: \_\_\_\_\_  
 Start date: \_\_\_\_\_  
 Job title: \_\_\_\_\_  
 Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_  
 Hours per week: \_\_\_\_\_  
 Benefits (if available): \_\_\_\_\_  
 Date submitted (with claim): \_\_\_\_\_

Milestones	Met	
<b>(Code D20)</b> Status 186 Supported Job Coaching	Y	N

Quality Indicators	Met	
Long-term Follow Up is identified and agreed to by vendor.	Y	N
Job coach assesses the client's adaptive behaviors, work skills, habits, and socialization on the job and provides training to address needs.	Y	N

Outcomes Payment Points Code D20	Met	
Outcome Payment \$		
Job Coach Assessment Written Report.	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Supported Job Coaching/Stabilized**  
**Code D21**

Client name: \_\_\_\_\_  
 Service provider: \_\_\_\_\_  
 Staff name: \_\_\_\_\_ DVRS counselor name: \_\_\_\_\_  
 Service Start Date: \_\_\_\_\_

Name of employer: \_\_\_\_\_  
 Name of supervisor: \_\_\_\_\_  
 Address and zip code: \_\_\_\_\_  
 Start date: \_\_\_\_\_  
 Job title: \_\_\_\_\_  
 Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_  
 Hours per week: \_\_\_\_\_  
 Benefits (if available): \_\_\_\_\_  
 Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D21	Met	
(Code D21) Supported Job Coaching       Status 22	Y	N	Job coach trains the employer and co-workers on clients training needs and strategies.	Y	N	Outcome Payment \$ Employer, client, and DVRS counselor sign Stabilization Form acknowledging amount of job coaching still necessary, that the job is acceptable and maintainable, and that client is working on commensurate wage that is at or above minimum wage.	Y	N
			Training provided on the job, one-on-one with the client until level of job coaching that is necessary is determined by the point of stabilization.	Y	N			
			Stabilization is reached defined by that point in time when the client, employer, DVRS counselor, and CRP have determined that the job performance is acceptable and maintainable.	Y	N			

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Supported Job Coaching/45 Days**  
**Code D22**

Client name: \_\_\_\_\_

Service provider: \_\_\_\_\_

Staff name: \_\_\_\_\_

DVRS counselor name: \_\_\_\_\_

Service Start Date: \_\_\_\_\_

Name of employer: \_\_\_\_\_

Name of supervisor: \_\_\_\_\_

Address and zip code: \_\_\_\_\_

Start date: \_\_\_\_\_

Job title: \_\_\_\_\_

Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_

Hours per week: \_\_\_\_\_

Benefits (if available): \_\_\_\_\_

Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D22	Met	
<b>(Code D22)</b> Supported Job Coaching	Y	N	Job coaching is provided at the level identified on the stabilization form and the client maintains suitable and stable employment.	Y	N	Outcome Payment \$  45 Day Report written after stabilization	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**COVERSHEET**  
**The Division of Vocational Rehabilitation Services**  
**Supported Job Coaching/90 Days**  
**Code D23**

Client name: \_\_\_\_\_  
 Service provider: \_\_\_\_\_  
 Staff name: \_\_\_\_\_  
 DVRS counselor name: \_\_\_\_\_  
 Service Start Date: \_\_\_\_\_

Name of employer: \_\_\_\_\_  
 Name of supervisor: \_\_\_\_\_  
 Address and zip code: \_\_\_\_\_  
 Start date: \_\_\_\_\_  
 Job title: \_\_\_\_\_  
 Job duties: \_\_\_\_\_

Current wage: \_\_\_\_\_  
 Hours per week: \_\_\_\_\_  
 Benefits (if available): \_\_\_\_\_  
 Date submitted (with claim): \_\_\_\_\_

Milestones	Met		Quality Indicators	Met		Outcomes Payment Points Code D23	Met	
(Code D23) Status 26 Supported Job Coaching	Y	N	Employer and client decide that the job is stable and suitable with the amount of job coaching identified on the stabilization form.	Y	N	Outcome Payment \$  90 day written report after stabilization with business signature of stable employment.	Y	N

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**The Division of Vocational Rehabilitation Services**  
**Guidelines to Complete Written Narrative**  
**for Assessment Report**  
**Codes D3, D4, D5, D8**

Please address the following:

**1. Assessment Questions**

Describe all information and questions from the DVRS counselor and client to be addressed by the evaluation.

**2. Purpose of the Assessment**

Information within this section should include but not be limited to the client's employment goals, and the client's statement for being assessed.

**3. General Information**

This section should include information that is relevant to the client obtaining successful employment and the vocational recommendations.

Information within this section should include but not be limited to the following: relevant work history; educational level/special programming; hobbies/special interests; transportation issues (valid drivers license, public transportation); identified functional limitations related to the disability(s).

**4. Assessment Information**

In this section information should identify and interpret the results of the client's vocational assessment (facility, community work-site, comprehensive vocational, or career exploration). Information will include the client's: work behaviors; work skills; work tolerance; learning style; physical capacity; labor market information and any other relevant assessment information.

Comprehensive Vocational Evaluation will also include: intellectual capacities test results; academic test results; and aptitude test results.

**5. Assessment Results and Recommendations**

Information in this section will answer the referral questions and identify a job goal(s). This section may also include any supports; training recommendations; current work skills; barriers impacting employment; assistive technology accommodations; environmental work conditions; learning style; and level of supervision the client may need for employment.

Career exploration results will also include: computerized assessment, information interviews, internet research on careers, and/or labor market information, etc.

**6. Signature and date of staff completing the final assessment report should be included.**

**The Division of Vocational Rehabilitation Services**  
**Guidelines to complete**  
**Enhanced Plan/Amendment**  
**Codes D9, 10**

Job placement issues are those issues or problems that the client will need to resolve in order to become successfully employed and to maintain employment. The problems or issues may relate but are not limited to: the client's vocational training needs; transportation limitations; support needs (babysitting, spouse work schedule, residential rules); disability related limitations (medication, therapy); inappropriate work behavior; unstable living condition; unidentified work goals; etc. After development of the initial plan, the vocational rehabilitation counselor determines that this regular plan is not sufficient to assist the client in reaching the employment goal and an enhanced plan may be utilized.

The difference between "Enhanced Planning" and regular planning is the process defined by the collaboration of the team and the resulting plan that is developed according to the following:

1. Plan to achieve employment goals may include but are not limited to:
  - ✓ The client's strengths, interests, preferences and employment goal(s);
  - ✓ The client's functioning in living, learning and working environments;
  - ✓ The realistic challenges and the accommodations and work site supports needed for the assessment activities and employment;
  - ✓ The past activities that have been successful or unsuccessful in obtaining the client's employment goals;
  - ✓ The assessment methods and activities to be used to assist the client to make an informed choice in the selection of an employment goal;
  - ✓ The individuals responsible in conducting or assisting with the assessment(s) of the employment goal;
  - ✓ The projected time and dates to accomplish the assessment activities.
2. **Enhanced Plan Amendment** is developed if substantial changes have happened in the client's life. These life changes should be addressed in an amended plan.



**The Division of Vocational Rehabilitation Services**  
**Guidelines to Complete Written Narrative**  
**Report for Training Services**  
**Codes D11, D12, D13, D14**

Please address the following:

**1. Purpose of training**

Information in this section should state the specific goals and objectives of the training program for each individual client, and how the training prepares the client for employment in his/her local labor market.

**2. Training provided**

Information in this section should include: the training activities; schedule of the training; training adaptations utilized to address individual needs; production levels achieved; skills achieved; behavior and attitudes modified; and additional information relative to the training program.

**3. Training results (Work Adjustment- D 12)**

Information in this section should identify the level of improvement achieved by the client in: work behavior/attitude; appearance/hygiene; attitude towards compliance with work rules; acceptance of supervision; co-worker relationships; conducting an independent job search; self confidence and other skills relative to the individual client's needs. In addition, information in this section should report the issues still remaining that could not be adjusted during the course of this training.

**Training results (Job Seeking Skills – D 13)**

Information in this section should identify the level of improvement achieved by the client in: writing a resume; interviewing; completing applications; writing follow up letters; accessing the hidden job market; discussing disability issues; understanding ADA rights in the interview process; making cold calls; interviewing skills; preparing for work; and other skills relative to the client's individual needs.

**Training results (Transportation – D 14)**

Information in this section should identify the skill level achieved by the client in: learning the bus routes; taxi procedures; para-transit; etc., appropriate to his/her vocational needs. In addition, information in this section should report the training issues still remaining.

**4. Recommendations (Work Adjustment – D 12)**

The Work Adjustment training information in this section will relate to the client's job placement planning. The report will identify the client's specific adaptations, supports and accommodations as needed to obtain and maintain competitive employment. If client has not achieved the expected outcome, recommendations should suggest additional services needed to prepare the client for competitive employment.

**Recommendations (Job Seeking Skills – D 13)**

The Job Seeking Skills training information in this section will relate to the client's job placement planning. If the client has not achieved the required skills to perform an independent job search, recommendations should suggest additional supports and services needed to obtain competitive employment.

**Recommendations (Transportation – D 14)**

Information included in this section should identify the client's capability to utilize the transportation system, as a result of the training program. The recommendations should also include instruction on training methods and techniques to use for future transportation training needs.

Signature and date of staff completing the training report should be on the final report.

**The Division of Vocational Rehabilitation Services  
Guidelines to Complete Written Narrative Report  
for Job Development Services  
Code D15**

Please address the following:

**1. Purpose of Job Development**

Summarize the client's goals for employment specific to the placement plan.

**2. Job Development Services Provided**

The information in this section should summarize: employers contacted by CRP staff on client's behalf; employer contacts made by client; other services in support of job development i.e. job-site analysis, advising client on resume development, accompanying client to interviews, etc.

**3. Summarize the CRP and Client Interactions**

This section should include employer name(s); person contacted; job position; results of the contact; additional comments; client's involvement in job search process.

**4. Recommendations**

Information in this section should identify current and/or potential barriers for the client to maintain employment and recommend additional placement supports and/or services needed to start and maintain employment.

**The Division of Vocational Rehabilitation Services  
Guidelines to Complete Written Narrative Report  
Job Follow Up Report Services  
Codes D16 and D17**

Please address the following:

**D 16 - 45 day written report**

Information in this section should include the client's current job status, and if any additional services or accommodations are needed to maintain employment.

**D 17 – 90 day written report**

Information in this section should summarize the rationale for the client's job stability. Stabilization will occur when the following conditions are in place: the client's work skills and behaviors are acceptable to the employer; the employment arrangement is acceptable to the client; it is anticipated by both the employer and the client that the job will continue; ongoing supports necessary to maintain the job are in place; and the team, including the DVRS counselor, agrees that the job is stable and consistent with the IPE.

Signature and date of staff completing the final report should be included.

**The Division of Vocational Rehabilitation Services**  
**Guidelines to complete Written Narrative Report**  
**for Selective/Supported Job Coaching**  
**Codes D19, D22 & D23**

Please address the following:

**1. Purpose of Selective/Supported Job Coaching**

Information in this section should state the specific goals and objectives of the Job Coaching program for each client.

**2. Job Coaching Provided and Results**

Information in this section should include: the job coach activities provided; identify the services provided to the employer; analysis of the service needs that were addressed; adaptations utilized; development of natural supports; address client and employer satisfaction; identify problems or issues and how they were resolved. Information in this section should report the problems and issues still remaining that would interfere with the client maintaining employment.

**3. Recommendations**

Information in this section should include: follow along services; post employment needs; any additional support needs.

Signature and date of staff completing the final report should be included.

**The Division of Vocational Rehabilitation Services  
Guidelines to complete Written Narrative Report  
for Selective/Supported Job Coaching  
Code D20**

Please address the following:

**1. Purpose of Assessment**

Information in this section should assess the client's adaptive behavior, work skills, habits, and socialization on the job.

**2. Assessment Results and Recommendations**

Information in this section should identify the coaching needs and strategies to achieve the work skills and socialization necessary to stabilize on the job. In addition the information should identify employer and co-worker education/training needed to support the client in becoming an integral part of the business.

Signature and date of staff completing the coaching report should be on the final report.